

2012 BRINGING ADMINISTRATORS TOGETHER CONFERENCE

iBuy & Related Procurement Issues

April 11, 2012 - 1:45pm to 2:45pm

UIC UNIVERSITY OF ILLINOIS
AT CHICAGO

UIC

Lincoln Hall

7075 South Morgan Street

Workshop Presenter(s)

- Julia Kilgore
iBuy Trainer
(312) 996-2808
- John Meehan
Visiting Assistant Director of Purchasing
(312) 413-5961

Please ...

- Turn off cell phones.
- Avoid side conversations.
- Questions can be asked at any time
- Sign the attendance roster.
- Complete the evaluation at the end of the workshop.

Agenda

- iBuy
 - Strategic Plans for iBuy
 - New Reporting
 - What's New
 - Standing Orders
- Procurement Issues
 - Exemptions & Waivers
- Q & A Session



Julia Kilgore, iBuy Trainer

Our Strategic Plan for iBuy



- All employees with an Enterprise ID will be given access to iBuy as a Shopper
- Training will be provided by Department
- Purchasing Department Buyers will promote iBuy for purchasing needs
- New iBuy support function will be advertised
- A set of standardized reports for departments will be created

Strategic Plan for iBuy

1. Access
2. Training
3. Marketing
4. Support
5. Reports

- **Access:** As recommended by the UIC ARR Committee, shopper access will be granted to everyone to gain familiarity with iBuy
- **Training:** Instructor-led Training by College / Department, webinars, online tutorials and job aids
 - A training schedule for all members using iBuy will be established
 - Appointments can be set to determine roles and responsibilities within each department
 - Train-the-Trainer efforts to assist with maintaining workflow, roles and responsibilities



Strategic Plan for iBuy

1. Access
2. Training
3. Marketing
4. Support
5. Reports



- **Marketing:** Communications from Purchasing promoting iBuy use for requisitions and purchase orders and in support of other campus initiatives (e.g. the use of Diversity vendors and sustainability); Showcase Events
- **Support:** Dedicated resource(s) to assist departments learning and using the iBuy system
- **Reports:** Share metrics with units comparing their iBuy usage to usage of other procurement methods where iBuy catalogs are available.
Build departmental score cards to monitor performance success towards goal

Current Reporting - Expense Trends

Get Access	Get Help	Reports	BI Analytics	Download Data	About Data	DW Changes	AboutDS
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Get Access DECISION SUPPORT [DS Home](#) | [EDDIE](#) | [Contact](#) | [Search](#) | [AITS Home](#)

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[About Standard Report Access](#)

Info for Users

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Info for USCs

[Requesting User Access](#)

[Requesting Application Accounts](#)

[Check User or Dept. Access](#)

EXPENSE TRENDS ANALYSIS (ETA)

Expense Trends Analysis provides summary information for expenses. The product suite includes a data cube, and a data mart.

❖ About Expense Trends Analysis

Expense Trends Analysis (ETA) is designed specifically for individuals who want to look at summarized expense data over time. Its goal is to be easier than writing your own reports. ETA moves beyond reports to provide analysis. This means you don't have to start with a specific question. You may have a question to begin with, but what you really want is to learn about your expenses and analyze the data. This product is not intended to provide a level of detail useful for reconciliation or transaction listings. Although that is valuable information, reconciliation activities should be performed utilizing the university's standard financial transaction listings. Rather, this product is intended to help users identify expense trends and outliers through the use of summarized data.

For more information or to get started, consult the following resources. All files are Adobe PDF format.

❖ ETA Guides and Support

- [Detailed Analysis Guide](#) (Includes Definitions)
- [ETA Definitions](#) (Definitions Only)

❖ Connecting to ETA

- [Get Access to OLAP Cube](#)
- Connect to the ETA Cube
 - [UIUC Connect to Expense Trends Analysis](#)
 - [UIC Connect to Expense Trends Analysis](#)
 - [UIS Connect to Expense Trends Analysis](#)

❖ Additional Support

If you would like additional support or have questions regarding Expense Trends Analysis, please send a note to the [Decision Support User Support Specialists](#).

- To request access for this information from your Security Administrator



Expense Trends – Current Reporting

UIC_ETDemo.xlsx [Compatibility Mode] - Microsoft Excel

PivotTable Tools
Options Design

Subtotals Grand Totals Report Layout Blank Layout

Row Headers Banded Rows
Column Headers Banded Columns

PivotTable Style Options PivotTable Styles

A16 fx FX

Chart Of Account	2 - University of Illinois - Chicago				
Fiscal Year	2011				
Total Expense Amount	Purchase Method Code				
College Code	BANNER	I-BUY	OTHER	P-CARD	
FL	\$1,396,363.98	\$107,624.59	\$23,758,472.78	\$581,609.56	
FM	\$7,346,837.46	\$168,715.38	\$11,996,604.45	\$145,789.56	
FN	\$5,927,016.60	\$752,907.15	\$31,777,874.56	\$1,233,284.07	
FP	\$3,996,629.46	\$132,872.35	\$19,924,641.85	\$807,229.50	
FQ	\$4,905,196.02	\$634,854.17	\$39,333,214.85	\$1,387,136.73	
FR	\$538,147.01	\$25,353.00	\$11,136,940.83	\$698,108.39	
FS	\$216,545.70	\$7,691.56	\$3,641,325.19	\$67,398.37	
FT	\$11,531,951.81	\$1,480,565.33	\$95,404,174.50	\$3,733,272.77	
FV	\$2,173,715.51	\$177,320.04	\$14,568,428.70	\$459,091.09	
FW	\$2,201,949.42	\$149,851.07	\$20,603,296.30	\$870,274.00	
FX	\$49,197,038.00	\$1,491,283.98	\$41,226,019.21	\$4,851,399.41	
FY	\$12,198,494.48	\$489,496.65	\$51,173,574.47	\$1,986,061.63	
FZ	\$6,162,614.74	\$1,965,394.68	\$56,409,511.27	\$3,330,844.55	
GA	\$32,201,783.52	\$2,159,681.95	\$316,510,785.81	\$6,714,682.75	
GC	\$6,854,686.93	\$26,734.66	\$49,770,377.66	\$1,434,610.49	
GD	\$125.00		(\$125.00)		
GE	\$3,567,410.70	\$164,988.15	\$27,834,300.59	\$974,942.01	
GF	\$4,550,447.06	\$150,599.22	\$24,457,582.67	\$1,023,627.92	
GG	\$494.81		\$70,797.73	\$13,148.49	
GH	\$199,840,597.22	\$1,936,447.98	\$376,158,076.06	\$2,954,831.31	
GJ	\$34,151.31		\$575,360.85	\$1,210.80	
GL	\$2,778,930.72	\$19,804.76	\$11,026,987.79	\$499,688.75	
GN	\$563,753.06	\$3,889.09	\$4,797,863.40	\$252,084.16	
GP	\$784,562.52	\$71,593.95	\$13,254,644.92	\$309,657.25	
GQ	\$7,848,575.67	\$231,583.51	\$14,157,103.58	\$279,386.41	
GT	\$38,025.66	\$9,406.80	\$836,865.63	\$69,535.35	
HY	\$40,271,636.58		\$59,680,701.03	\$40,614.70	

PivotTable Field List

Choose fields to add to report:

- Dollars and Counts**
 - Total Expense Amount
 - Total Number of Transactions
- By CFOAP**
 - Account Hierarchy
 - Acct Expense Hierarchy
 - Fund Hierarchy
 - Org Expense Hierarchy
 - Organization Hierarchy**
 - College Code
 - Department Name
 - Organization
 - Account
 - Chart of Account**

Drag fields between areas below:

Report Filter: Chart Of Acc..., Fiscal Year

Column Labels: Purchase Met...

Row Labels: Organization ...

Values: Total Expens...

Defer Layout Update

New Reporting Enhancements

NEW Drill Down capability

NEW Available through the Purchasing HUB

5 Years of purchasing information

Familiar format of Microsoft Excel

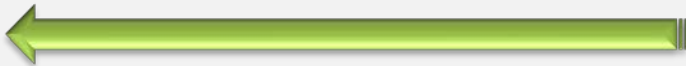
Slice and dice expenditures via iBuy, Banner, P-Card, etc.

iBuy Updates: What's New

IT Consulting Services

- Using the IT Consulting Contracts iBuy request form, departments will avoid the standard ~~RFP~~ and ~~Exd~~ procurement process

- Save time and \$\$\$





iBuy Updates: What's New

IT Consulting Services Six Groups of Services:

1. Services to develop strategic plans, governance, performance measurement, long-range planning and documenting, designing and implementing process changes
2. Services for planning and implementing infrastructure
3. Services for planning and implementation information security
4. Services for analysis, development, testing and project management of new applications, websites and vended products
5. Services for improving customer service
6. Services for supporting the teaching and learning mission of the University

For more information, please see the IT Consulting Contracts website:
<http://www.ecio.uillinois.edu/itconsultingcontracts>

iBuy Updates: What's New

Hotel Group Services

- Departments are now allowed to use iBuy to process all hotel meeting agreements.

This includes:

- Room rentals
- Catering services
- Various equipment needs



iBuy allows the users to attach supporting documents, check status of request and approve online, thus reducing the time from requisition to purchase order approval.

John Meehan

Visiting Assistant Director of Purchasing

RELATED PROCUREMENT ISSUES



Changes in the Illinois Procurement Code

- Recent changes in the Illinois Procurement Code (new Public Act 97.643) relaxed procurement requirements for certain categories of expenditures
 - Exemptions from the procurement codes
 - Waiver process for exemptions from registration, certification or hearing requirements



Exemptions from the Procurement Code

In general the Procurement Code no longer applies to University for 5 categories of expenditures:

1. Membership in professional, academic, or athletic organizations
2. Events or activities paid exclusively by revenues generated by the event or activity or gifts or donation.
3. Artistic or musical services, performances or productions



Exemptions from the Procurement Code

Categories of Expenditures (continued):

4. Events or activities for which the use of specific vendors is mandated or identified by the sponsor (*The use of specific vendors mandated by the conference in NCAA tournaments is one of the most notable examples of this exemption*)
5. Periodicals or books for use by a university library or academic department (*expenditures for textbooks for student use or materials for resale or rental are not exempted from the Code*)



Process for Waivers

- The waiver process requesting exemptions from registrations, certification or hearing requirements of the Code may be done in writing and requires the sign-off from the Executive Assistant Vice President, State and Chief Procurement Officers



Process for Waivers

Types of procurement to which the waiver process applies are as follows:

- Contracts with foreign entities necessary for research or educational activities
- Procurement of FDA-related goods, products and services necessary for the delivery of care and treatment at medical, dental, or veterinary teachings facilities
- Contracts for programming and broadcast license rights for university-operated radio and television stations
- Procurements required for fulfillment of a grant



QUESTIONS & ANSWERS

"I can find a better price" and other frequently asked questions

Questions & Answers

True

False

- I can change my profile information in iBuy

FALSE. The information has to be changed in NESSIE. iBuy profile information pulls from NESSIE, and if it isn't corrected, your profile won't be correct.



Questions & Answers

True



False



- All necessary documents can be attached in iBuy

TRUE. Similar to adding attachments in an email, iBuy allows you to include quotes, drawings and contracts. It is suggested to save all attachments to your hard drive and then upload it as you do with other attachments in other applications.



Questions & Answers

True

False

- iBuy cannot search across punch-out and hosted vendors

FALSE. To search across punch-out and hosted vendors, select “Shop Everything” box using a keyword or item (product) number.



Questions & Answers

True

False

- I can use my P-Card and not iBuy since I do not order infrequently

FALSE. P-Card is to be used for emergency only and frequency is not a qualifier.



Questions & Answers

True



False



- I can see if my requisition has been approved in iBuy

TRUE. iBuy keeps a complete history and shows you every step of the approval process. Once you open the requisition you can click on the “Req Approval” tab and see where the requisition is in the approval process. By looking in the “History” tab, you can see each step of the process, and when it was sent to the vendor.



Questions & Answers

True



False



- The new iBuy Trainer is accessible

TRUE. For any questions regarding iBuy needs contact:

–Julia Kilgore @ kilgorej@uillinois.edu

-- Or - phone: (312) 996-2808



Questions & Answers

True

False

- iBuy is an easy application to learn and use

FALSE.* You will hate it... until you learn it and then you'll love it. There is a new initiative in supporting the use of the iBuy system through various training vehicles:



- Instructor-led – Julia Kilgore
- Webinars and online resources are currently available

CHALLENGE!

- Provide the item
- Price*
- Vendor
- Quantity
- Frequency



* Please do not include coupons